

**Phoenix Program
Process Definition – Purchasing Module**

| | |
|----------------|--|
| Process | <i>Requisition Amount Approval</i> |
| Process Number | <i>PO – 005</i> <i>Revised 04/14/00</i> |

Description of Process

This process describes the review and approval of Requisitions for agencies using the PeopleSoft approval process.

Input to Process

Requisitions in “Pending Approval” status.

Output of Process

Approved, Denied or Recycled Requisitions. Denied and Recycled Requisitions remain in a “Pending Approval” status.

Service Level Agreement Required? (if yes, provide a brief description)

| |
|--|
| |
|--|

PeopleSoft Panel Groups being Used

| Function | Panel Group |
|----------------------|-----------------------------|
| Requisition Approval | Requisition Amount Approval |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |
| | |

Phoenix Program Process Definition – Purchasing Module

Business Process Description

| Process Description | Responsibility (Agency/Centralized) |
|--|--|
| Step 1: Navigate to the Requisition Items menu (Go, Administer Procurement, Requisition Items). | Agency Approver |
| <p>Step 2: Navigate to the Requisition Items Amount Approval panels (Use, Amount Approval, Approval).</p> <p>The Amount Approval dialog box displays.</p> <p>Enter search criteria:</p> <p>To search for a specific Requisition, enter the Business Unit and Requisition ID. Click OK. The Requisition Amount Approval panel displays.</p> <p>To display the list of Requisitions in a "Pending Approval" status, key the "Origin" code for which the approver has approval authority, or leave this field blank if authorized to approve for multiple origins. Click OK. A list of Requisitions requiring Amount Approval displays. Review the list and select a Requisition for amount approval that is within their dollar authority range.</p> | Agency Approver |
| <p>Step 3: Review data displayed on the "Approval" panel (requisition date, total amount and BCM status).</p> <p>Go to the "Details" panel to review further detail.</p> | Agency Approver |
| Step 4: On the Details panel, reviews line descriptions, quantities, and amounts. | Agency Approver |
| <p>Step 5: Returns to the "Approval" panel and selects an "Approval Action" of "Approve", "Deny" or "Recycle". If Deny or Recycle is selected, key a reason in the "comment" field provided, and any instructions to the buyer regarding corrections to the Requisition.</p> <p>Note: Generally, "Deny" is used if the Requisition is to be canceled, and "Recycle" is used if the Requisition needs correcting.</p> | Agency Approver |
| Step 6: Save the panel and repeat the process for other Requisitions requiring Amount Approval. | Agency Approver |
| | |

Forms Used with Process (#)

**Attach sample form(s)

**Phoenix Program
Process Definition – Purchasing Module**

Process Flow Diagram (if appropriate):

A large, empty rectangular box with a thin black border, intended for a process flow diagram. It occupies the central portion of the page below the title and above the footer.